

• Note: PMRs **shall** be submitted to the SBPO **seven (7) business days prior to the scheduled date and revisions are due five (5) business days after scheduled PMRs.**

# Mentor-Protégé Program (MPP) Program Management Review (PMR)

**Include Mentor and Protégé Company's Name  
and MPP Agreement Number**

**01 Jan 11 - 31 Mar 11**  
**Evaluation Period Dates**  
**(01 May 11)**  
**Enter current date**

**•The PMR teleconf phone number and PIN number for the call-in should be added at the bottom of this first page.**

# Agenda

- Background - DoD Mentor-Protégé Program
- Participation in Program
- Mentor-Protégé Agreement with (Protégé) Corporation
  - Protégé Profile to include type of business & expirations dates
  - Areas of Developmental Assistance
  - Milestones
  - Accomplishments
  - Mentors Success
  - The Path Forward
- Financials, Administrative Discussions
- After Care Program

# PMR SCHEDULES

- All PMR's shall follow the below schedules for reviews.

Months Covered			PMR date
OCT	NOV	DEC	JAN
JAN	FEB	MAR	APR
APR	MAY	JUN	JUL
JUL	AUG	SEP	OCT

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# Mentor Participation

- (List participation in previous M-P programs)

# Team Members

- (Mentor)
- (Protégé)
- (HBCU)
- (PTAC)
- (SBC)
- (DCMA)

**\*\*The DCMA Mentor-Protégé Program Manager should always be invited\*\***

**\*\*Mentor is responsible for ensuring all parties (Protégé, HBCU/PTAC/SBC and DCMA) are invited and available to participate in PMRs. All Participant's should be present for PMR via Telecom\*\***

# Current Mentor-Protégé Agreement

- (Protégé) Corporation- NGA (Reimbursable)
  - Headquartered in
  - Type of company I.E woman owned, Hubzone, 8(a) (include expiration dates, if applicable)
  - Corporate Capabilities
- Federal Government Agency Clients
- MPP Agreement Performance Period:
  - o Year 1 – (DD/MM/YYYY-DD/MM/YYYY)
  - o Year 2 – (DD/MM/YYYY-DD/MM/YYYY)
  - o Year 3 – (DD/MM/YYYY-DD/MM/YYYY)

# Developmental Assistance / Milestone Schedule

ID	Developmental Assistance/Milestone Schedule	Baseline Start	Actual Start	Baseline Finish	Actual Finish	2013				2014				2015				Qtr
						Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	
1	Program Kickoff	Mon 10/1/12	NA	Fri 11/2/12	NA													
2	<b>Year 1 Developmental Assistance</b>	<b>Mon 10/8/12</b>	<b>NA</b>	<b>Mon 9/30/13</b>	<b>NA</b>													
3	<b>Technology Transfer</b>	<b>Mon 10/8/12</b>	<b>NA</b>	<b>Mon 9/30/13</b>	<b>NA</b>													
4	Milestone	NA	NA	NA	NA													
5	<b>Business Development</b>	<b>Mon 10/8/12</b>	<b>NA</b>	<b>Mon 9/30/13</b>	<b>NA</b>													
6	Milestone	NA	NA	NA	NA													
7	<b>Business Management</b>	<b>Mon 10/8/12</b>	<b>NA</b>	<b>Mon 9/30/13</b>	<b>NA</b>													
8	Milestone	NA	NA	NA	NA													
9	<b>Year 2 Developmental Assistance</b>	<b>Tue 10/1/13</b>	<b>NA</b>	<b>Tue 9/30/14</b>	<b>NA</b>													
10	<b>Technology Transfer</b>	<b>Tue 10/1/13</b>	<b>NA</b>	<b>Tue 9/30/14</b>	<b>NA</b>													
11	Milestone	NA	NA	NA	NA													
12	<b>Business Development</b>	<b>Tue 10/1/13</b>	<b>NA</b>	<b>Tue 9/30/14</b>	<b>NA</b>													
13	Milestone	NA	NA	NA	NA													
14	<b>Business Management</b>	<b>Tue 10/1/13</b>	<b>NA</b>	<b>Tue 9/30/14</b>	<b>NA</b>													
15	Milestone	NA	NA	NA	NA													
16	<b>Year 3 Developmental Assistance</b>	<b>Wed 10/1/14</b>	<b>NA</b>	<b>Wed 9/30/15</b>	<b>NA</b>													
17	<b>Technology Transfer</b>	<b>Wed 10/1/14</b>	<b>NA</b>	<b>Wed 9/30/15</b>	<b>NA</b>													
18	Milestone	NA	NA	NA	NA													
19	<b>Business Development</b>	<b>Wed 10/1/14</b>	<b>NA</b>	<b>Wed 9/30/15</b>	<b>NA</b>													
20	Milestone	NA	NA	NA	NA													
21	<b>Business Management</b>	<b>Wed 10/1/14</b>	<b>NA</b>	<b>Wed 9/30/15</b>	<b>NA</b>													
22	Milestone	NA	NA	NA	NA													

**This slide should reflect "real" milestones which depict important decision/tasks with subtasks clearly defined in order for NGA/DCMA to show if on task, schedule, etc. There should be substance to the milestones and should reflect tasks planned to assist with the enhancement/development of the protégé. Schedule of PMR presentation should not be part of milestones schedule. Also, for those MPP Agreements awarded as CPFF, your milestone should clearly depict timeline in which "fees" will be applied. *\*I agree, some mentors have a milestone category of Tech Transfer with sub-tasks below, this should then fall in line with the time-line for billing fee.***

**\*A formal Change Request (CR) must be submitted and approved by NGA before REVISED milestone will be determined acceptable. All CRs must be signed by both the mentor and protégé before submitting to NGA for consideration.**

# Accomplishments

- Growth since start of agreement
  - Return on Investments see slide 11
- Developmental Assistance / Technology Transfer
- Developmental Assistance / Business Infrastructure
- (These are all examples, you could add additional areas)



# Prime and Subcontracting Awarded Efforts

<u>Awarding Agency/Contractor Name</u>	<u>Relationship of Protégé</u>	<u>Contract Type</u>	<u>Amount Obligated/Funded to Protégé</u>	<u>Status / Award Date</u>
DHS Eagle	Subcontractor	IDIQ	\$2.5 mil	Awarded 21 Sep 2006
<i>EXAMPLE: Follow to ROI Defense Information Systems Agency (DISA) Encore II</i>	Prime	CPFF	\$440,000.00	01 OCT 2012

**This slide should reflect all "awards received" during the agreement PoP, to include those from the mentor and those from other teammates. This list shall also include those subcontracting opportunities provided in the accepted Executive Summary/Proposal. Under the column titled "CONTRACT TYPE" if an IDIQ be sure to clearly indicate if a TO received and/or delivery order. Under the COLUMN TITLED "AMOUNT" this should be actuals "not an estimate of potentials". Under the column titled "STATUS" should be award date**

**\*If a Protégé is awarded an IDIQ then list it in awards but the amount should be zero until a task order is won; then reflect the value obligated for that order."**

**\*NOTES: Include all awards, both those from the mentor and those from other teammates.**

Attachment 2

**Revised 12 Aug 2015**

## Return on Investment

<b>Protégés Actual Prime and Subcontract Awards where dollars were Obligated and funded the award, to include; any delivery or task order under an IDIQ, any purchase order, modification increase or funded contract.</b>	<b>Awarded During This Review Period</b>	<b>Cumulative from Start of Agreement (Start of Agreement is zero)</b>
DoD Prime Contract Awards to Protégé	<b>\$ 440,000.00</b>	<b>\$ 440,000.00</b>
DoD Subcontracts from Mentor to Protégé	\$	\$
DoD Subcontracts to Protégé from All Other Sources Other than Mentor	\$	\$
DoD Subcontracts from Protégé to Mentor	\$	\$
DoD Subcontracts from Protégé to Other Than Mentor	\$	\$
Other Federal Prime Federal Contracts- All Other Federal (Excluding DoD) Prime Awards to Protégé	\$	\$
Other Federal Subcontracts- All Other Federal (Excluding DoD) Subcontract Awards to Protégé from Mentor	\$	\$
Other Federal Subcontracts - All Other Federal (Excluding DoD) Subcontract Awards to Protégé from All Sources Other than Mentor	\$	\$
Other Federal Subcontracts - All Other Federal (Excluding DoD) Subcontract Awards to Mentor from Protégé	\$	\$
Other Federal Subcontracts - All Other Federal (Excluding DoD) Subcontract Awards from Protégé to Other Than Mentor	\$	\$

**This slide should reflect/correspond to the total dollars provided on this slide for PRIME & SUBCONTRACTOR AWARDED EFFORTS. This slide should account for DoD and other Federal opportunities.**

# Proposal Activity

<u>Awarding Agency/Contract or Name</u>	<u>Relationship</u>	<u>Contract Type</u>	<u>Amount</u>	<u>Status</u>
DHS Eagle	Subcontract or	IDIQ	\$2.5 mil	Pre-solicitation
Defense Information Systems Agency (DISA) Encore II	Prime	CPFF	\$440K	Proposal sent

**This slide should reflect proposal activity ONLY. The column titled "STATUS" should have annotations such as: preparing proposal, proposal submitted, decision pending, no award received/not selected, etc. Be sure to include date of activity.**

# Financials

- Total Contract Value:
- Current Year Value
- Total Expended (include percentage rate)
  - Address cost incurred by mentor/protégé
- Remaining
- Explanation of Expenditure Rate (required when rate is plus/minus the average percentage rate)
- Underruns:

**NOTES:**

- Invoices shall be submitted monthly and shall include a Monthly Status Report (MSR) that will be used to substantiate the dollars spent, fees applied, etc.
- Underruns, if there are concerns with receipt of 3<sup>rd</sup> party invoices, change in milestones, etc. that may result in underruns this must be addressed.

# Protégé Resources

- EMPLOYEES:
  - At start of Agreement :
    - On contract
    - Overhead
  - Current Reporting Period:
    - On contract
    - Overhead
  - Challenges, Issues and Concerns (*Mentor or Protégé*):
  - Successes:

# Issues and/or Concerns with Agreement and/or Partnership

- Issues
- Concerns

**This slide should reflect any and all issues/concerns related to this agreement. We want feedback from both the mentor and protégé covering any areas in which there are concerns (e.g., program management, milestones, planned training, planned services, subcontracting, concerns with collaboration, etc. ). NO TOPIC is off limits.**

# The Path Forward

- Plans for change/improvements
  - Plans to address resource issues
- \* *If this slide follows Financials and resources, then they can address possible issues that were identified*

# HIGHLIGHTS OF MPP SUCCESS

## Background

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Protégé:

Mentor:

Contract:

Qualification: ( i.e, 8(a),  
SDB)

PoP: (i.e., 30 SEP 11 - 29 SEP 14)

POCs:

Mentor:

Name  
Phone  
Email

Portege:

Name  
Phone  
Email

## Technology Description

- List the highlights of the protégé's technology transfer

## Benefits to Warfighters /National Security Support

- Highlight the benefits to the Warfighter to OSD

## Success Stories

- Highlight your success stories to OSD

**\* Highlights of MPP Success can include those actions that have occurred during partnership (before and during PoP of NGA MPP Agreement.\***



# After Care Program

- How long will it continue?
- What is the scope of the After Care Program?
- How will After Care success be measured and reported to NGA?
- Reach back to ensure Protégé submits required reports 2 fiscal Years following the expiration of program.
- See Appendix I, 1-112.2 (e)  
program specific reporting requirements

# Summary

- Why are both parties participating in the MPP?
- List benefits of being in the program
- Has the MPP made your company successful?

# PMR Updates

- Five working days to make revisions or update any previously briefed or reviewed PMR
- Mark cover sheet of revision copy as “Revised”
- Provide updated information in subsequent PMRs in a different color.
- In each PMR, only address the important updated information
- The PMRs must be distributed to Program Managers SBPO, DCMA, and OSD AT&L.